

# PRIVATE PRACTICE BLISS SESSION ONE WORKBOOK

Presented by:

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# THE “NEGATIVE NELLY” OF PRIVATE PRACTICE

## Negative Nelly Thoughts:

- It's going to be so hard to create what I want and/or I feel greedy for what I want, I don't really need it.
- I don't have the skills or experience to offer the services on my own.
- I don't have the support I need and/or my relationships will be impacted.
- What if I'm not able to make enough money, charge enough or manage the finances of a business?
- What if I start this and no one books with me? Then.....
- What if I do something wrong and I'm sued? Then....
- What if I succeed? Then I'll have to.....
  
- Something else:

My biggest fear is

# FINISHING THE “WORRIED WENDY” OF PRIVATE PRACTICE

## Examples of Worried Wendy Thoughts

### What if.....

*I put all this time and energy into this and no one wants to work with me?*

### Then this will happen....

*I will have spent all of this money and I won't have the income I need to support myself*

### And then I will have to...

*Go back to public work*

### And I will feel.....

*Like a failure and that I'm stuck being controlled by a manager for the rest of my working life.*

# **FINISHING THE “WORRIED WENDY” THOUGHTS ABOUT PRIVATE PRACTICE**

**Worried Wendy (Or Negative Nelly) Thoughts**

**What if...**

**Then this will happen...**

**And then I will have to...**

**And I will feel...**

# **FINISHING THE “WORRIED WENDY” THOUGHTS ABOUT PRIVATE PRACTICE**

**Worried Wendy (Or Negative Nelly) Thoughts**

**What if...**

**Then this will happen...**

**And then I will have to...**

**And I will feel...**

# **FINISHING THE “WORRIED WENDY” THOUGHTS ABOUT PRIVATE PRACTICE**

**Worried Wendy (Or Negative Nelly) Thoughts**

**What if...**

**Then this will happen...**

**And then I will have to...**

**And I will feel...**

# MY BIGGEST FEARS OR STRUGGLES

**My three biggest fears/struggles about private practice are:**

1)

2)

3)

# MY TOP FIVE VALUES

**My top five values are:**

1)

2)

3)

4)

5)



# VALUE BASED LIFESTYLE “IDEAL DAY”

**Your ideal day in two years:**

What does your private practice look like?

Where are you providing service from?

How are you providing service?

Who are you providing service for?

Who is part of your private practice?

How is your private practice supporting you to live in alignment with your values?

# FOUNDATION INVENTORY

## I. Foundation Inventory

- I have reflected on my values and what kind of lifestyle will support my values.
  
- I have a plan to create a private practice that will help me live a lifestyle that supports my values.
  
- I have a practice in place to test growth (new services) in a way I am comfortable with.
  
- I have a system in place to monitor, review and adapt my business practices so that I am continually getting closer to or maintaining my ideal practice.
  
- I have the resources and supports I need to create my ideal practice.

Add 1 point for each one section you checked off (if you're part of the way in one section, you can give yourself half a point):

**My Score out of 5 is:**

# PRACTICE INVENTORY

## 2. Practice Inventory

- I have my ideal hours, schedule and location, rates and connections with insurance companies.
  
- I have my ideal folder of policies (confidentiality/privacy/terms of use/complaint/refund) and forms (intake/consent/invoices & receipts/speaking and workshop agreements).
  
- I have my ideal system for booking clients, sending reminders, documenting and accepting payments.
  
- I offer my services in more than a 1-1 fee for service format, so that I can scale my revenue and use my additional time/money for personal needs and business growth.
  
- I have the resources and supports I need for my ideal practice (supervision/consultation/legal/accounting/bookkeeping/eCommerce/business bank accounts/client software and platforms).

Add 1 point for each one section you checked off (if you're part of the way in one section, you can give yourself half a point):

**My total score out of 5 is:**

# SERVICE INVENTORY

## 3. Service Inventory

- I am offering the services that I want to offer, in the format I want to offer them, so I wake up excited to work in my practice
  
- I am working with my ideal clients and feel compassion satisfaction regularly
  
- I have the number of clients I want in the various formats I offer my services
  
- I have developed an expertise in an area and am known for it. I am able to help people in this area through various formats.
  
- I have the resources and supports I need for my ideal services (business mentor/clinical training/software/platforms)

Add 1 point for each one section you checked off (if you're part of the way in one section, you can give yourself half a point):

**My total score out of 5 is:**

# COMMUNICATIONS INVENTORY

## 4. Communications Inventory

- I am able to tell people exactly how they can benefit from my help, so I attract my ideal clients.
  
- I am happy with my plan and budget to communicate my services, so that I have regular referrals coming in.
  
- I have my ideal communications brand (website/cards/colours/fonts//brochures/language) so I attract my ideal clients.
  
- I have systems in place for ongoing communications and marketing, so I continue to increase the number of people who know about my services.
  
- I have the resources and supports I need for my ideal communications plan (writing for sales/website development/website hosting/graphics & design/bio/printing).

Add 1 point for each one section you checked off (if you're part of the way in one section, you can give yourself half a point):

**My total score out of 5 is:**

# FINANCIAL INVENTORY

## 5. Financial Inventory

- I know how my business structure (sole proprietorship/incorporated) impacts the way money is handled in my business (personal income or business revenue) and I understand financial statements such as income and balance sheets so I can make decisions from a clear financial perspective.
  
- I have a budget in place that I review regularly to ensure I am meeting goals, reducing costs and increasing income for my overall practice as well as each service I am offering.
  
- I have all the insurance I want (liability/life/accident/disability/health/office/cyber) and my legal agreements are in place for all my services.
  
- I have a solid financial system to ensure I am on budget and my taxes are paid.
  
- I have the supports and resources I need for my finances (bookkeeper/accountant/software)

Add 1 point for each one section you checked off (if you're part of the way in one section, you can give yourself half a point): /5

**My total score out of five is:**

# GROWTH INVENTORY

## 6. Growth Inventory

- I feel confident in all of the systems I have in place for each of the services I provide. My business flows smoothly and I get to work in the areas I feel very competent in and enjoy the most.
  
- I feel I am using my resources (time/money/energy) in the most efficient way possible that allows me to feel organized each day and to strategically meet my short and long term goals.
  
- I have a method for introducing new services that will allow me to test if there is a market without using a significant amount of time, money and energy and to ensure that new services are building in a way to grow my practice to the level I want it to be.
  
- I have a system to regularly assess my short and long-term goals to ensure my practice gives me the lifestyle to support my values. I also have a long-term vision for my practice so I know what kind of lifestyle I want it to support 10 years from now.
  
- I have the supports and resources I need for ongoing growth (family support/peer support/business mentor)

Add 1 point for each one section you checked off (if you're part of the way in one section, you can give yourself half a point): /5

**My total score out of 5 is:**

# TOTAL SCORE

**Scores:**

My score for foundation is:

My score for practice is:

My score for service is:

My score for communications is:

My score for financial is:

My score for growth is:

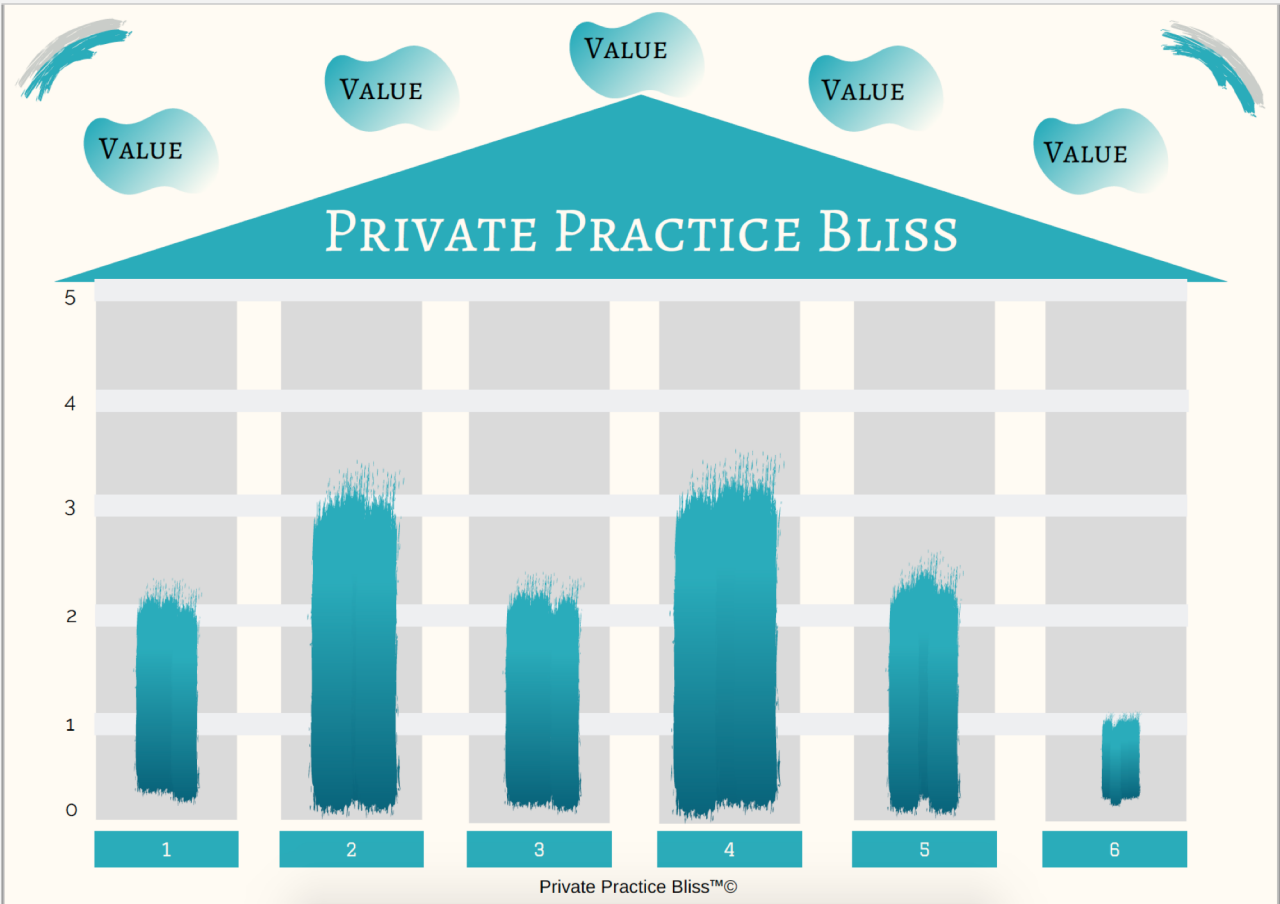
**Total Private Practice Bliss Inventory score is:     /30**

You can transfer your scores from each of these categories onto the Inventory Graph on the following page.

Having a visual can help you see what areas you need to focus on and track your progress over time.

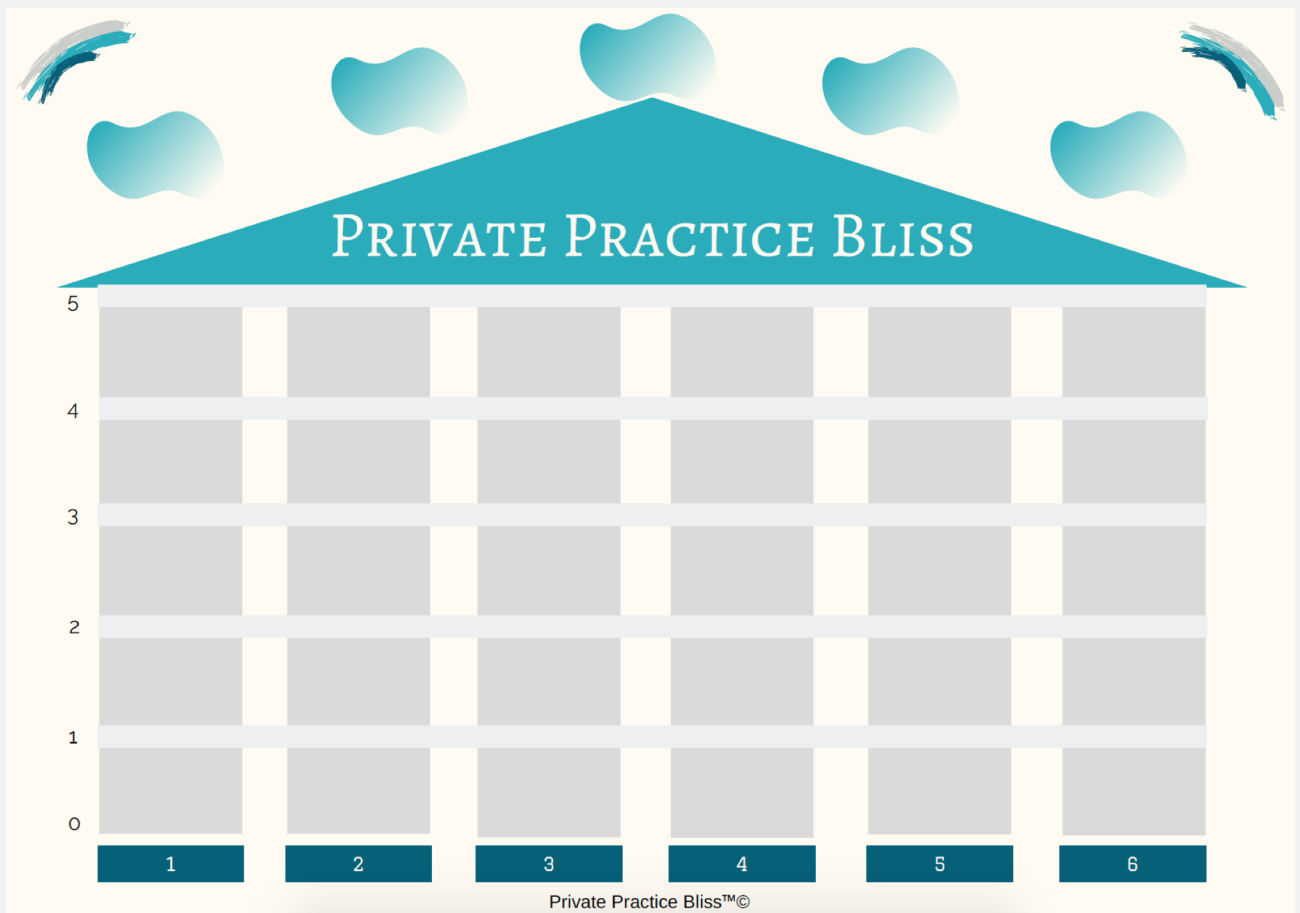


# EXAMPLE OF PRIVATE PRACTICE BLISS GRAPH



# PRIVATE PRACTICE BLISS GRAPH

Date:



# STRATEGIC GROWTH IDEAL PRACTICE

**My top three service experiences were:**

The service that brings me the most joy is working with someone who is struggling with \_\_\_\_\_ and by helping them using \_\_\_\_\_ the person is able to \_\_\_\_\_ .

What is the gender of the person who reached out to you for service?

Is that person a youth, adolescent, adult or senior?

Was the service provided to an individual, couple or family?

**My ideal client demographics (Gender, Age, Type of Client) are:**

# CLIENT CLARITY PROBLEMS

## **Your client's current day:**

How does your client feel when first waking up?

What are your client's biggest problems/concerns/worries?

How does your client know it's a problem

- How is it impacting their sleep/appetite/energy
- How is it impacting their work/school/relationships
- How is it impacting their thoughts/feelings/actions

What does your client fear will happen if they don't get help and resolve their problem?

Who is around your client? Are they a source of support or stress?

How are they currently managing/coping with their problem? Does it help?

Location, Commute, Career?

What are your client's strengths? Where else do they seek support?

What organizations/programs could help them?

# CLIENT CLARITY DESIRED OUTCOMES

**The miracle question:** If your client wakes up and a miracle has solved their primary problem, what would be different? How would they know their problem has been solved.

Eg: My client with panic disorder would have slept well, woke up and didn't immediately feel nausea, had an appetite and energy to make breakfast, was relaxed during her commute into work, was able to connect with her colleagues, was able to enjoy her work again, would have more contact with her friends, would resume her sport social club.

**How will your ideal client know things are getting better?**



# STRATEGIC PRODUCTIVITY BLOCK PERIODS

**What amount of time can you block for prioritized focus on your practice?**

30 Days. 90 Days. 180 Days. 365 Days.

- What roles can you release or pause?
- What responsibilities can you release or pause?
- What tasks can you release or pause?

Think of which tasks, responsibilities and roles don't directly serve your top three values. What can you outsource/combine/ignore/barter for during your time-limited period of focus?

# QUESTIONS/CONTACT

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